



Reach 2010 Europe





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We believe the close-up detail of the broadcast business speaks volumes.

That's why we examine data in different ways. One orbital position versus another, satellite versus cable, digital versus HD and many more.

Every year we make this available for our clients so they can make the best decisions for their organisations.

If you would like a fuller picture of what the markets are doing please contact us.

European highlights*

At year end 2009, 125 million homes receive audiovisual broadcast and broadband services via ASTRA at 19.2°, 23.5°, 28.2° or 5.0° East.

One in two TV homes in Europe receive services from ASTRA (51%).

The ASTRA satellite system consolidated its position as the top European satellite fleet for DTH reception.

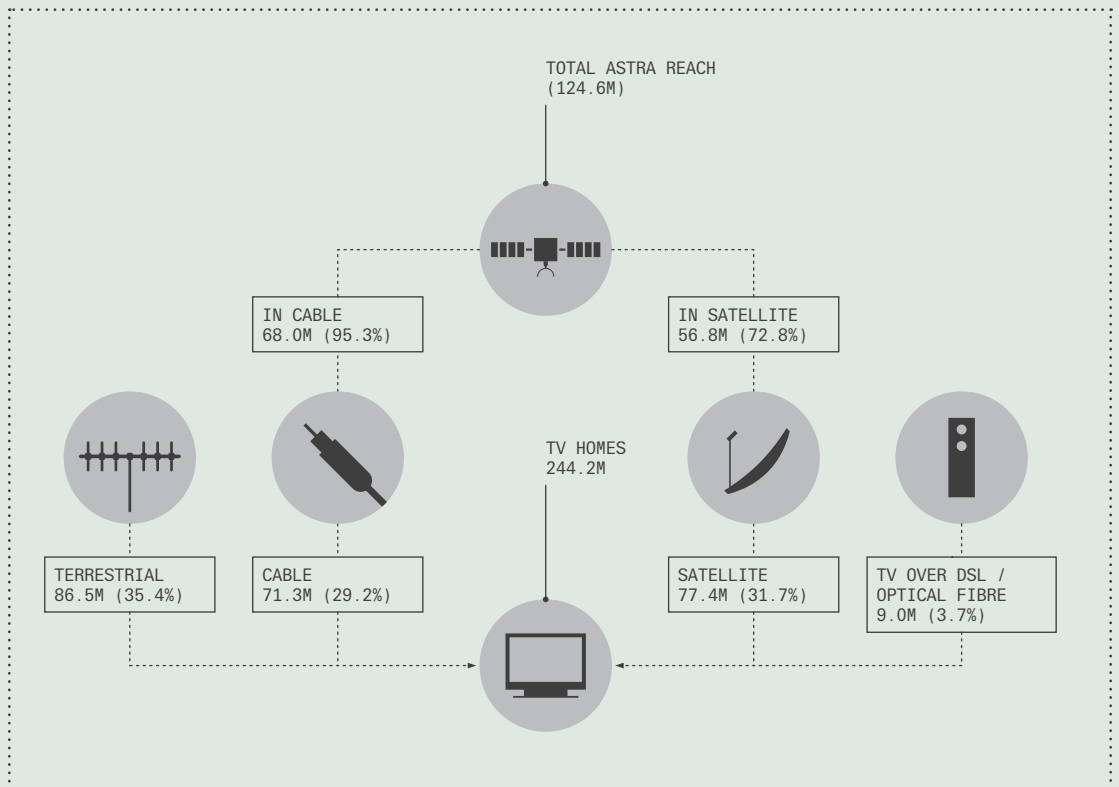
By end of 2009, 57 million homes receive ASTRA services directly via satellite. A further 68 million homes receive services via ASTRA satellites through cable networks.

60% of all TV homes within the ASTRA footprint are now receiving digital services.

Satellite continues to be the most popular digital reception mode, with a 49% share of the total digital market.

91% of all ASTRA satellite homes are digital.

*35 countries within the ASTRA footprint



MODES OF RECEPTION IN EUROPE

ASTRA reaches 57 million satellite homes

ASTRA consolidated its position as the top European satellite fleet for DTH reception, reaching 57 million satellite homes in Europe and North Africa.

These homes are served via the four orbital positions of the ASTRA satellite fleet:

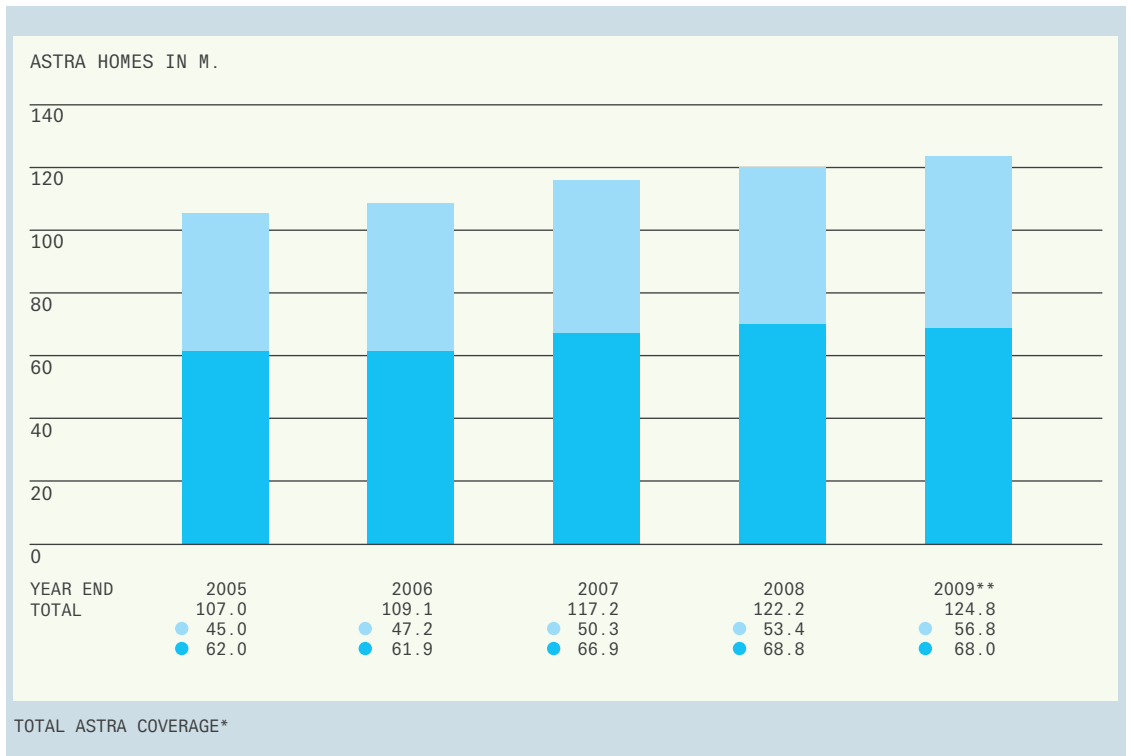
- 42.2 million satellite homes receive analogue and digital programming transmitted via ASTRA at 19.2°E.
- 1.6 million satellite homes in Belgium and the Netherlands, as well as in Czech and Slovak Republic, receive digital signals from 23.5°E.

- 11.6 million satellite homes watch ASTRA digital services via 28.2°E.
- The satellites at 5.0°E reach a further 4.3 million digital satellite homes.

Another 68 million homes are served indirectly by ASTRA through cable networks.

In addition to cable, ASTRA feeds the networks of more than 70%* of European IPTV providers.

(Source: B2B survey conducted by GfK in Q4 2009 among 36 out of 53 European IPTV providers)



■ Satellite
■ Cable

* includes ASTRA at 19.2°E, 23.5°E, 28.2°E and since YE07 also at 5.0°E (net reach without dual-feed).

** Bosnia, Greece, Norway, Portugal, Serbia, Sweden not updated at YE09, therefore based on YE08.

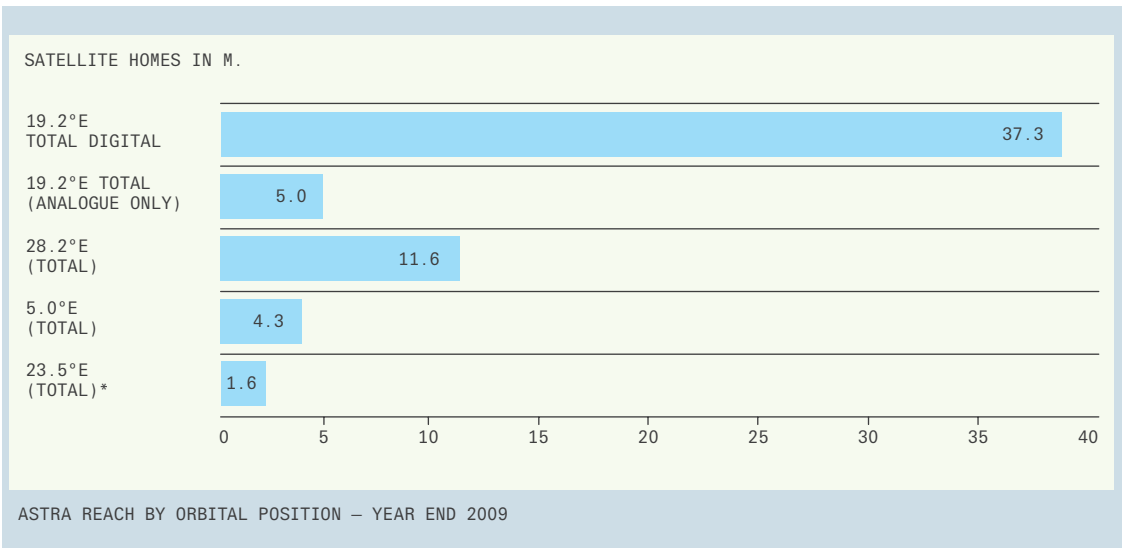
Source: SES ASTRA, Satellite Monitors.

Over 90% of ASTRA satellite homes are digital

ASTRA satellite growth in 2009 was driven by digital satellite reception.

The ASTRA satellites are serving 52 million digital satellite homes, of which 37.3 million are at

19.2°E, 11.6 million are at 28.2°E, 1.6 million are at 23.5°E and 4.3 million are at 5.0°E. 5 million ASTRA homes still exclusively receive analogue signals via 19.2°E. More than 85% of these homes are located in Austria, Germany and Switzerland.



The figures do not add up to the total ASTRA reach due to homes receiving from two of these orbital positions at the same time (dual-feed). *Most of the 23.5°E homes also receive services from 19.2°E (e.g. using the Duo-LNB). KDG (Kabel Deutschland GmbH) uses the ASTRA Satellites at 23.5°E to feed cable networks in Germany. **Source:** SES ASTRA, Satellite Monitors, YE09.

HDTV

125 million HD ready TV households in Europe

During 2009, the developments concerning HDTV have continued to gather speed.

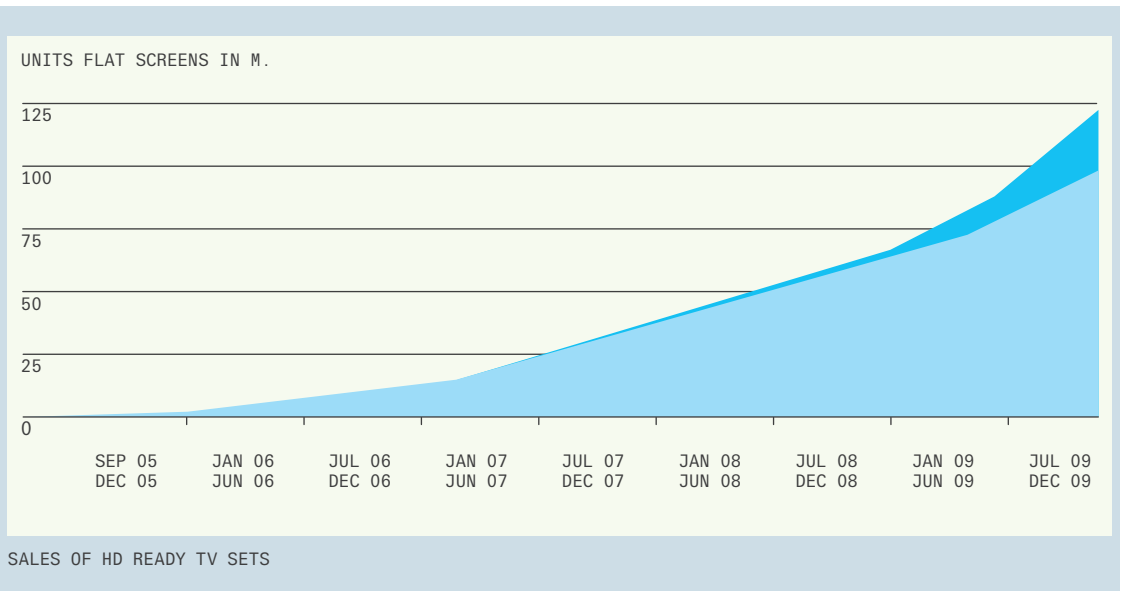
Almost 125 million HD ready TV sets have been sold in Europe since January 2005, representing up to 60% of all European TV homes. 50 million of these were sold in 2009.

Sales were driven by the attractiveness of larger flat screens, a further price decrease for HD ready sets and extended HD content offers in 2009.

Germany, UK and France continue leading in terms of sales volume.

Satellite continued to be the driver for HDTV channel growth across Europe and ASTRA further developed its line-up of HD channels.

ASTRA currently carries more than 145 commercial HD channels on its satellites over Europe. A lot of these channels are broadcast exclusively on ASTRA.



Full HD screens



Source: GfK Retail and Technology, January 2010. Type of Screens: LCD, Plasma, Rear projection. Europe: AT, BE, CZ, DK, FL, FR, DE, GR, HU, IT, NL, PL, PT, SK, ES, SE, CH, UK.

HD ready screens



Broadcast markets

Satellite drives digital growth

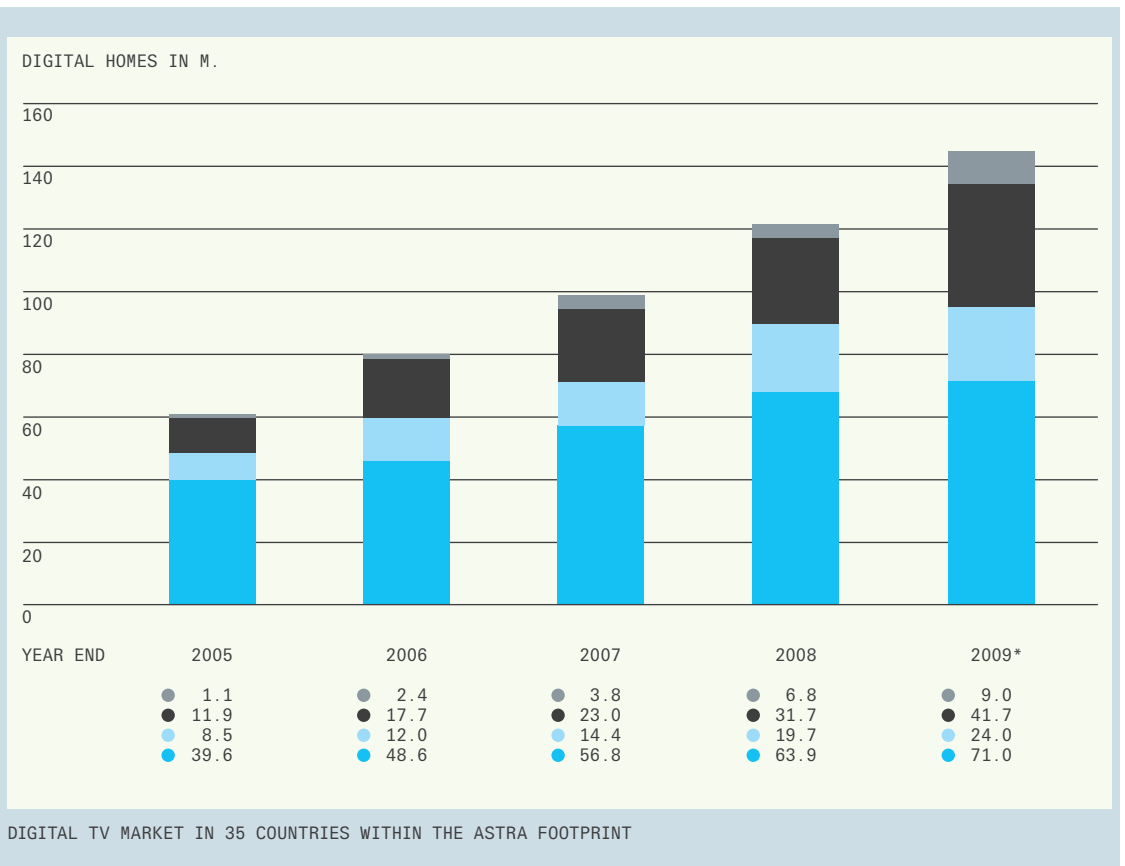
The growing number of digital TV, radio and interactive channels has boosted total digital reception to more than 145 million satellite, cable, terrestrial and DSL homes.

60% of all TV households in the 35 countries within the ASTRA footprint are digital.

Digital satellite growth was mainly driven by the UK & Ireland (+1.5 million homes), the Maghreb

(+1.2 million), the German-speaking countries (+1.0 million), Poland (+0.8 million), Italy (+0.5 million) and Ukraine (+0.6 million). With 71 million homes – representing a market share of 49% amongst all digital homes – satellite remains by far the most important digital reception mode.

24 million homes receive their TV signals via digital cable, 41.7 million via digital terrestrial reception and 9 million homes via DSL.



*Bosnia, Greece, Norway, Portugal, Serbia, Sweden not updated at YE09, therefore based on YE08. **Source:** SES ASTRA, Satellite Monitors.

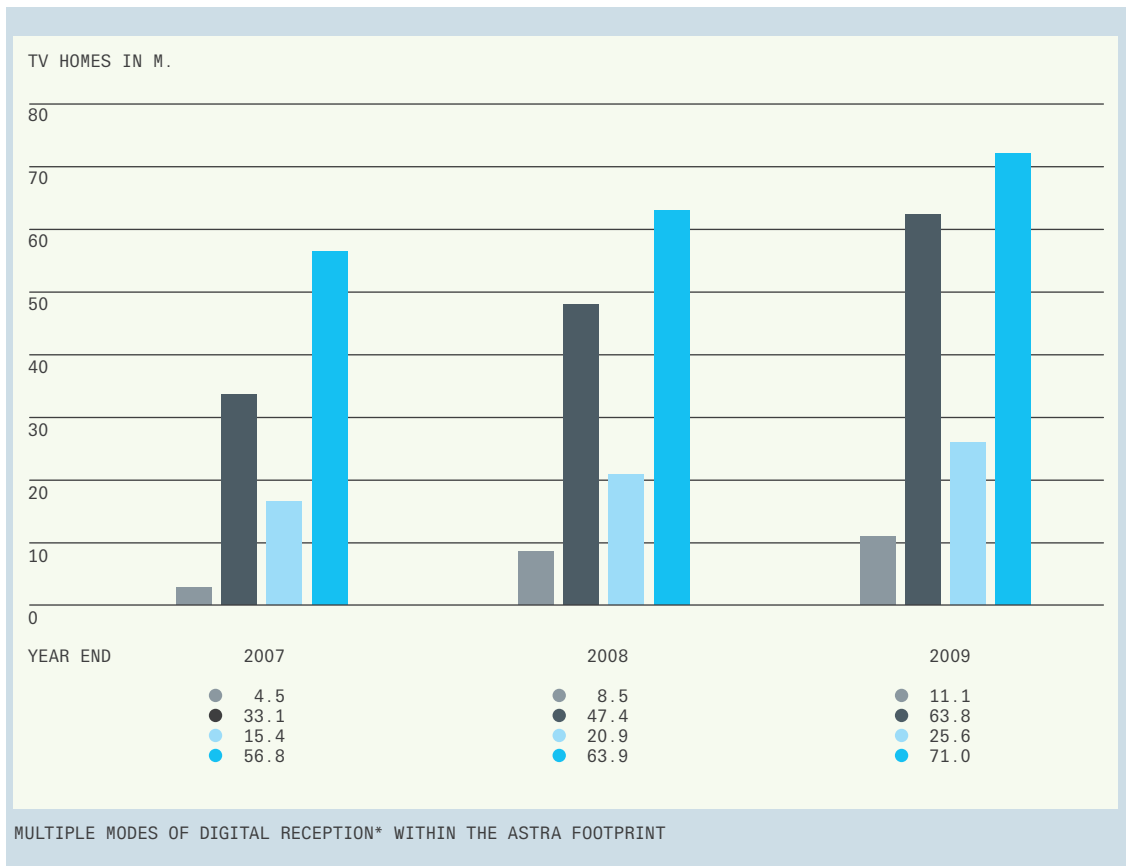
Satellite is the preferred mode of digital reception

Some households receive digital programming via multiple reception modes. For example, a digital satellite household may also receive from DTT, IPTV or digital cable.

63.8 million total households receive DTT. This includes 41.7 million households relying on DTT as their only mode of reception, as well as 22.1 million DTT homes also receiving via another mode.

Similarly, there are 11.1 million total homes receiving TV over DSL and 25.6 million receiving digital cable.

Satellite remains the preferred digital provider, even taking into account multiple digital reception modes.



- TV over DSL/Optical fiber
- DTT
- Digital Cable
- DSTV

*Multiple modes of digital reception = all digital modes of reception on all TV sets.
Source: SES ASTRA, Satellite Monitors.

Broadcast markets

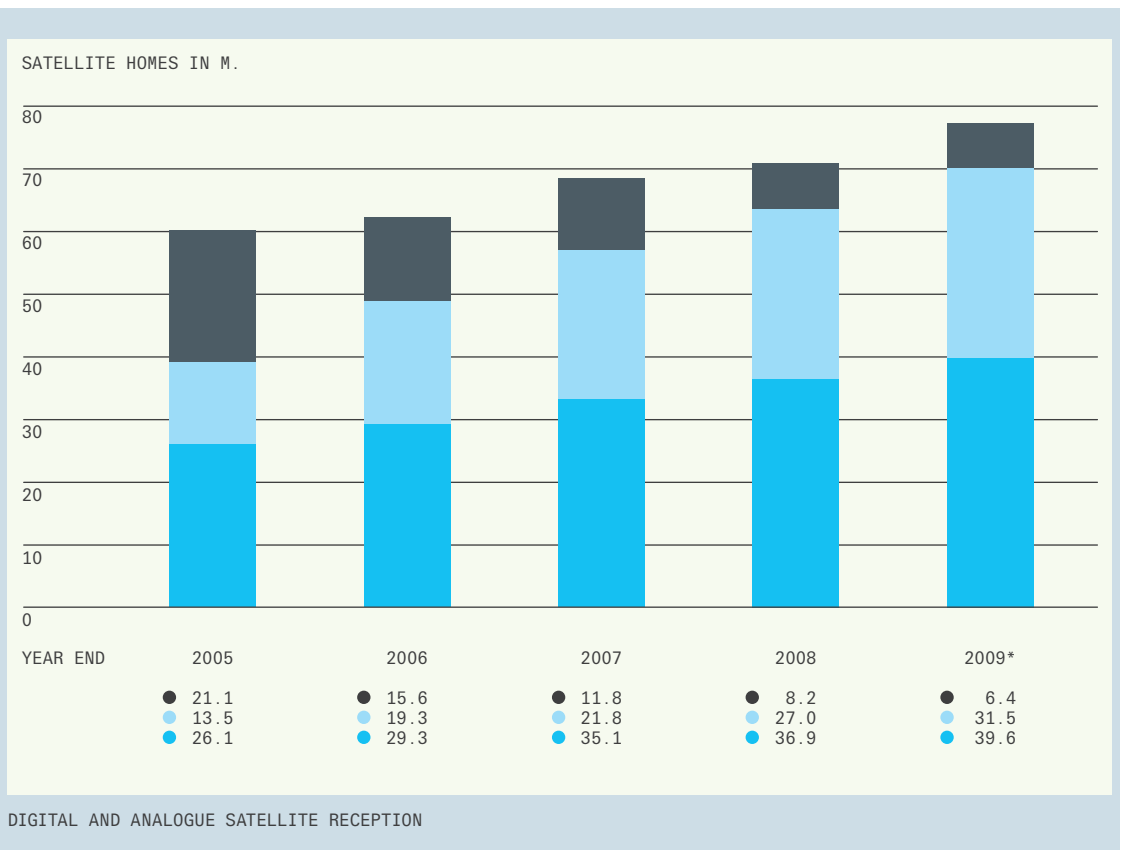
More than 90% of all satellite homes are digital

Both free TV and pay TV are driving digital growth; digital channels are received in 31.5 million free-TV homes and 39.6 million pay-TV homes.

The ASTRA satellites currently carry almost 2,500 digital TV, radio and interactive channels.

The increase in digital free-to-air reception mainly comes from the German-speaking countries, the Maghreb and Ukraine.

Analogue-only satellite reception continues to decrease, yet still reaches 6.4 million homes.



Analogue only
 Digital Free
 Digital Pay

*Bosnia, Greece, Norway, Portugal, Serbia, Sweden not updated at YE09, therefore based on YE08. **Source:** SES ASTRA, Satellite Monitors.

ASTRA Satellite Monitors

Independent research authorities confirm the quality of ASTRA Satellite Monitors

Our market research team undertakes detailed market analysis which we share with our clients and business partners.

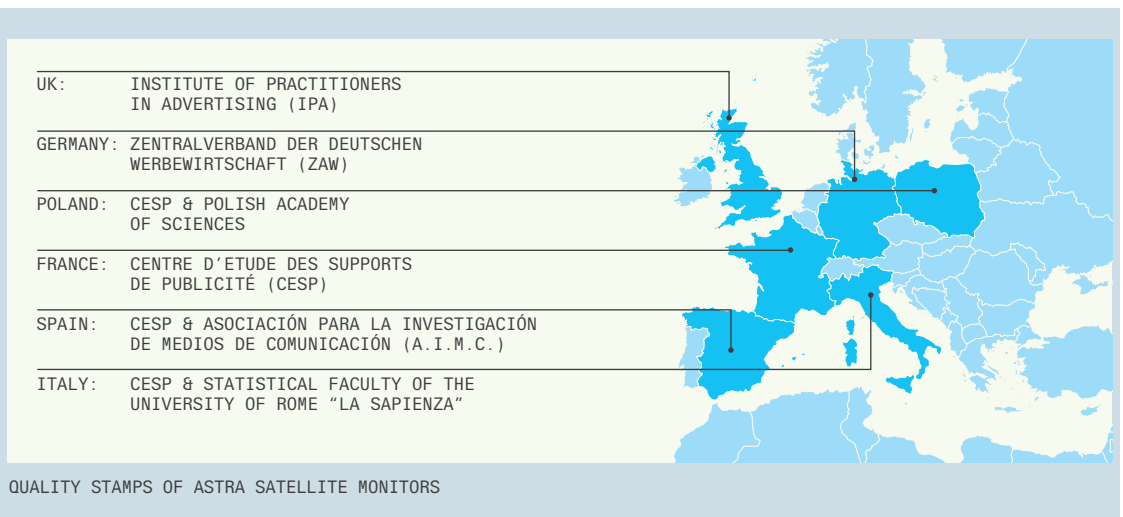
The Satellite Monitors, commissioned by SES ASTRA, continuously measure the development of the reception market for broadcast and broadband services in 35 countries within the ASTRA footprint. At year end 2009, SES ASTRA conducted almost 70,000 interviews.

Carried out by leading market research institutes and using harmonised and acknowledged research methodologies, these surveys have

been audited and awarded quality stamps by independent research authorities in France, Germany, Italy, Poland, Spain and the UK.

Methodology: TV homes receive signals via various modes of reception simultaneously (satellite, cable, terrestrial, DSL), either on one or several TV sets. In order to evaluate the market shares of the various modes of TV reception, the total must not exceed 100%.

The prioritisation of the modes of TV reception allows us to evaluate the market shares. Priorities are defined according to the number of channels which can be received by each mode of reception.



ASTRA Satellite Monitors – Research Institutes

Algeria	TNS Maroc	Latvia	GfK CR Baltic
Austria	GfK Austria	Lithuania	GfK CR Baltic
Belarus	NOVAK	Luxembourg	TNS ILRES
Belgium	TNS Media	Morocco	TNS Maroc
Bulgaria	GfK Bulgaria	Netherlands	TNS NIPO
Croatia	GfK Croatia	Poland	GfK Polonia
Czech R.	GfK Czech	Romania	GfK Romania
Denmark	TNS Gallup	Slovak R.	GfK Slovakia
Estonia	GfK CR Baltic	Slovenia	GfK Slovenia
Finland	TNS Gallup	Spain	Instituto DYM
France	IPSOS MédiaCT	Switzerland	TNS Infratest
Germany	TNS Infratest	Tunisia	TNS Maroc
Hungary	GfK Hungaria	Ukraine	GfK Ukraine
Ireland	MRBI Market Research Ltd.	UK	Kantar Media
Italy	TNS		

ASTRA coverage 2010

Markets in million	Universes			ASTRA coverage			
	TV homes	Satellite & Cable	Satellite	Cable	Satellite & Cable	Satellite	Cable
ASTRA at 19.2°E (Total)							
Algeria	5.94	5.78	5.78	0.00	2.61	2.61	0.00
Austria	3.51	3.23	1.84	1.40	3.23	1.84	1.40
Belarus	3.82	2.08	0.30	1.78	0.23	0.09	0.14
Belgium	4.86	4.13	0.42	3.71	4.06	0.35	3.71
Bosnia	1.19	0.55	0.26	0.29	0.48	0.23	0.25
Bulgaria	2.89	2.14	0.68	1.46	1.35	0.19	1.16
Croatia	1.43	0.66	0.41	0.25	0.42	0.25	0.17
Czech Rep.	4.25	2.08	0.96	1.12	1.36	0.62	0.75
Denmark	2.48	1.93	0.44	1.49	1.46	0.21	1.24
Estonia	0.57	0.37	0.08	0.30	0.21	0.03	0.18
Finland	2.13	1.03	0.08	0.95	0.28	0.02	0.25
France	24.58	8.27	6.10	2.16	7.46	5.29	2.16
Germany	37.43	34.78	16.20	18.58	34.63	16.06	18.58
Greece	3.49	0.41	0.41	0.00	0.17	0.17	0.00
Hungary	3.97	3.27	0.85	2.42	2.61	0.46	2.16
Ireland	1.46	1.03	0.75	0.28	0.02	0.02	0.00
Italy	23.90	7.87	7.87	0.00	2.06	2.06	0.00
Latvia	0.89	0.70	0.17	0.53	0.36	0.05	0.30
Lithuania	1.34	0.65	0.11	0.55	0.38	0.04	0.34
Luxembourg	0.17	0.17	0.05	0.12	0.16	0.04	0.12
Morocco	5.64	4.80	4.80	0.00	2.68	2.68	0.00
Netherlands	7.12	6.05	0.61	5.44	6.05	0.61	5.44
Norway	2.06	1.66	0.67	0.99	0.96	0.20	0.76
Poland	14.31	9.41	4.52	4.88	6.98	2.10	4.88
Portugal	3.73	1.80	0.53	1.27	1.25	0.15	1.09
Romania	7.09	6.68	1.79	4.89	2.12	0.20	1.93
Serbia	2.49	1.40	0.23	1.18	1.08	0.12	0.96
Slovak Rep.	2.02	1.53	0.80	0.74	1.16	0.55	0.60
Slovenia	0.68	0.38	0.05	0.33	0.32	0.05	0.27
Spain	16.02	4.17	2.68	1.49	3.43	1.94	1.49
Sweden	4.28	2.93	0.83	2.10	0.74	0.19	0.55
Switzerland	2.93	2.62	0.53	2.09	2.55	0.46	2.09
Tunisia	2.19	1.85	1.85	0.00	1.25	1.25	0.00
Ukraine	17.85	8.84	2.90	5.95	2.73	0.79	1.94
UK	25.49	13.51	10.88	2.62	0.33	0.33	0.00
Total	244.19	148.75	77.41	71.34	97.16	42.24	54.92
ASTRA at 28.2°E (Total)							
Ireland					1.02	0.74	0.28
UK					13.49	10.87	2.62
Total					14.52	11.61	2.90
ASTRA at 23.5°E (Total)*							
Belgium					0.14	0.14	0.00
Czech Republic					1.83	0.71	1.12
Netherlands					0.39	0.39	0.00
Slovak Republic					1.14	0.40	0.74
Total					3.50	1.64	1.86
ASTRA at 5.0°E (Total)							
Belarus, Bulgaria, Estonia, Latvia, Lithuania, Romania, Ukraine					16.05	3.21	12.84
Denmark, Finland, Norway, Sweden					5.71	1.10	4.61
Total					21.76	4.31	17.45
Total ASTRA reach (net)					ASTRA at 19.2°E, 28.2°E, 23.5°E or 5.0°E		
ASTRA 19.2°, 28.2°, 23.5°E or 5.0°E, counting homes receiving from two of these orbital positions at the same time (dual-feed) only once.					124.75	56.79	67.96

Note: Some numbers do not add-up due to roundings.

*Most of the 23.5°E homes also receive services from ASTRA 19.2°E, notably using the Duo-LNB.KDG (Kabel Deutschland GmbH) uses the ASTRA Satellites at 23.5°E to feed cable networks in Germany. **Source:** SES ASTRA, Satellite Monitors, YE09.

Join us on the frontier

In many ways, the story of television's evolution has only just begun.

In Europe, for example, there are still 40% of people who don't have anything more advanced than analogue TV. For us, this figure represents an opportunity.

Because wherever new audiences and broadcasting meet, there is a possibility of real growth.

At ASTRA we seek out these frontier markets. It could be in Slovakia or the Ukraine, South Africa or Sweden.

But geography is only one kind of frontier. There are other kinds, like introducing new standards of picture quality. At the end of 2009, there were six million High Definition TV homes on ASTRA. In the coming years this will boom by another 14 million.

Along with new markets, new broadcast technology clearly represents an exciting area of development.

Finally, but perhaps most importantly, there is a frontier of space. Although this is often taken for granted, we're doing new things here too. Switchable beams, for example, which will link Europe with the Middle East.

But like every satellite we fly and every project we handle, it's not just about technology.

It's about bringing new experiences to new audiences and new revenues to broadcasters doing new things.

Talk to us

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